Sourcing Instructions for Suppliers: Reviewing and Responding to Negotiations

Last Updated: 4-Jun-18

Table of Contents

1 Reviewing Negotiations

Please follow the instruction in the PDF document "Sourcing Instructions for Suppliers – Accessing Negotiations". Once you are in the negotiation, you may explore the various sections. If you have any questions about these sections, please reach out to the Buyer directly. When reviewing the negotiation, pay special attention to the following:

1.1 Reviewing the Header

1. **Terms** section identifies the terms for the negotiation. If you have any questions on the negotiation terms, please reach out to your Bechtel buyer

Terms

Bill-To Address	US_AZ_GLENDALE_85305-2201	Payment Terms	NET 30
Ship-To Address	Bechtel	Carrier	
Delivery Terms	Delivered Duty Paid - DDP	Freight Terms	

2. **Currency** section identifies all acceptable currencies for the event. Additional response currencies may be added by the Buyer.

Currency

Auction Currency	USD	Price Precision	2

3. **Requirements** are any preconditions or qualifications to supplement the bid. Bechtel may additionally require you to provide targeted information specific to the scope of work.

Requirements

Show All Details | Hide All Details

Details	Section
▶	Commercial
▶	Technical

Note: Click **Show All Details** to expand all requirement questions

4. **Notes and Attachments** includes any notes the buyer wants to relay about the negotiation as well attached files containing the Scope of Work, Terms & Conditions, and other Contract Terms. To open an attachment, simply click the attachment title.

Notes and Attachments

Note to Suppliers   Please download the document below by clicking the Title of the attachment.

Title △	Type △	Description △	Category △	Last Updated By △	Last Updated △	Usage △	Update	Delete
Attachment 1	File	T&Cs	To Supplier		07-Jun-2018	One-Time	✏	🗑

Note: Please ensure that you download all attachments if you intend to bid.

1.2   Reviewing the Lines

This contains the Products needed for the Project and includes Description, Unit of Measure, Target Quantity, Promised date, etc. per line item.

1.3   Reviewing the Controls

Controls are Response Rules set by the Buyer. If you have any questions regarding controls, please contact the Buyer directly.

1.4 Reviewing the Contract Terms

The Contract Terms section is where all the deliverables for the negotiation will reside. Any questions regarding the contract terms should be directed to your Bechtel buyer

2 Responding to Negotiations

After you receive an invitation to participate in a negotiation, you can acknowledge your participation and create a quote. Follow the instruction below to acknowledge participation and create a quote.

2.1 Acknowledging Participation

1. Review the negotiation, and select **Acknowledge Participation** from the actions menu. Then click **Go.**

2. Upon reviewing the negotiation, please acknowledge participation by picking **Acknowledge Participation** next to **Actions** and click **Go.** This will then bring you to a new page where you will decide if you company will participate in the negotiation by clicking **Yes** or **No** (shown below):

   a. **Yes - Accept.** If accepted, you may participate in the negotiation.
   b. **No - Decline.** If declined, you <u>will not</u> be included in additional communications about this specific event in the future, and is not expected to participate in the negotiation. If you respond no on accident, please contact the buyer for the next steps.

3. After choosing your response to the invitation, click **Apply.**

Note: If you respond "no" your Bechtel buyer may remove your company from the negotiation. If you respond "no" by mistake, please contact your Bechtel buyer for assistance.

2.2   Creating a Quote – Header

1. First, ensure you have reviewed the negotiation in full, including downloading all the header level **Attachments.**

2. To create a response, click **Create Response/Quote/Bid** under the **Actions** drop down menu then click **Go.**

3. When creating a quote, you will first land on the **Header**. On the header of the create quote page you can add any notes to the buyer, select the quote currency, and upload attachments.

2.2.1. Uploading Attachments

1. To add attachments, Click the **Add Attachments** button.

2. This will redirect you to a new page. Add a title and description then browse your computer and select the appropriate file. You can also insert a URL, short text, and long text attachment. On the top right corner, click **Apply** to attach the file or **Add Another** to attach the file and attach another.

Add Attachment

Cancel | Add Another | Apply

Attachment Summary Information

Title
Description
Category   From Supplier

Define Attachment

Type ● File   [   ] Browse...
        ○ URL   [   ]
        ○ Short Text
        ○ Long Text

3. You will see a confirmation at the top of your screen

Confirmation
Test attachment has been added successfully.

Create Quote: 492139 (RFQ 109708)

Cancel | View RFQ | Quote By Spreadsheet | Save Draft | Continue

2.3   Creating a Quote – Lines

1. Click on the **Lines** tab to input your quote/pricing information.

Create Quote: 492139 (RFQ 109708)

Cancel | View RFQ | Quote By Spreadsheet | Save Draft | Continue

Title

Time Left   7 days 22 hours
Close Date 22-Mar-2018 14:16:31

Header | **Lines**

RFQ Currency   USD
Price Precision   Any

Quote Currency   USD

Line	Ship-To	Rank	Start Price	Target Price	Quote Price	Unit	Target Quantity	Quote Quantity	Promised Date	Quote	Update
1 Stuff	US_WA_KENNEWICK_99336-0000	No Quote				LUMP SUM	1	1		No ▾	✏

◎ Indicates more information requested. Click the Update icon.

2. Populate the available fields including **Quote Price** and **Promised Date**

Create Quote: 492139 (RFQ 109708)   Cancel | View RFQ | Quote By Spreadsheet | Save Draft | Continue

| | Title | | | | | | Time Left | 7 days 22 hours |
| | | | | | | | Close Date | 22-Mar-2018 14:16:31 |

Header | Lines

| RFQ Currency | USD | | | | | Quote Currency | USD |
| Price Precision | Any | | | | | | |

Line	Ship-To	Rank	Start Price	Target Price	Quote Price	Unit	Target Quantity	Quote Quantity	Promised Date	Quote	Update
1 Stuff	US_WA_KENNEWICK_99336-0000	No Quote				LUMP SUM	1	1		No ▽	✎

◎ Indicates more information requested. Click the Update icon.

Note: The **Promised Date** field may default to the date the buyer has entered. You may edit and/or delete this date. The **Promised Date** is not a mandatory field.

3. If you wish to provide more detail for a line, you can upload line level **Attachments** or any **Notes to Buyer.** To do this, click the update button. Enter all of the necessary information, and then click **Apply.**

Create Quote: 492139 (RFQ 109708)   Cancel | View RFQ | Quote By Spreadsheet | Save Draft | Continue

| | Title | | | | | | Time Left | 7 days 22 hours |
| | | | | | | | Close Date | 22-Mar-2018 14:16:31 |

Header | Lines

| RFQ Currency | USD | | | | | Quote Currency | USD |
| Price Precision | Any | | | | | | |

Line	Ship-To	Rank	Start Price	Target Price	Quote Price	Unit	Target Quantity	Quote Quantity	Promised Date	Quote	**Update**
1 Stuff	US_WA_KENNEWICK_99336-0000	No Quote				LUMP SUM	1	1		No ▽	✎

Create Quote 492139: Line 1 (RFQ 109708)   Cancel | Save Draft | Apply   **③**

Description	Stuff	Close Date	22-Mar-2018 14:16:31
Unit	LUMP SUM	Quote Currency	USD
Start Price		Rank	No Quote
Target Price		Ship-To	
Quote Price		Need-By Date	
Target Quantity	1	Promised Date	
Quote Quantity	1		

Notes

① Note to Buyer

Attachments

② Add Attachment

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

4. When satisfied with your bid, click **Continue.**

| Create Quote: 492139 (RFQ 109708) | | | | | | | Cancel | View RFQ | Quote By Spreadsheet | Save Draft | Continue |

| | Title | | | | | | Time Left | 7 days 22 hours | | | |
| | | | | | | | Close Date | 22-Mar-2018 14:16:31 | | | |

Header **Lines**

| RFQ Currency | USD | | | | Quote Currency | USD |
| Price Precision | Any | | | | | |

Line	Ship-To	Rank	Start Price	Target Price	Quote Price	Unit	Target Quantity	Quote Quantity	Promised Date	Quote	Update
1 Stuff	US_WA_KENNEWICK_99336-0000	No Quote				LUMP SUM	1	1		No ⌄	✏

5. You will then be prompted to **Review** your quote, then either **Submit** or **Save Draft** to submit your quote at a later time**.**

| Create Quote 492139: Review and Submit (RFQ 109708) | | | | Cancel | Back | Validate | Save Draft | Printable View | Submit |

Header

	Title			Time Left	7 days 22 hours
	Supplier			Close Date	22-Mar-2018 14:16:31
	Supplier Site			Quote Valid Until	
	RFQ Currency	USD		Reference Number	
	Quote Currency	USD		Note to Buyer	
	Price Precision	Any			

Attachments

Title △	Type △	Description △	Category △	Last Updated By △	Last Updated △	Usage △	Update	Delete
Test	File	Test	From Supplier		14-Mar-2018	One-Time	✏	🗑

Lines

| | | | | Quote Total (USD) | 100.00 | | | | | |

	Line	Line	Ship-To	Start Price	Target Price	Quote Price (USD)	Unit	Target Quantity	Quote Quantity	Line Total	Need-By Date	Promised Date
⦿	Stuff	1 Stuff	US_WA_KENNEWICK_99336-0000			100	LUMP SUM	1	1	100.00		

6. A confirmation window will appear after clicking **Submit.**

📑 **Confirmation**

Quote 492139 for RFQ 109708 (Testing publish) has been submitted.

Return to Sourcing Home Page

2.4   Acknowledging Amendments

If the Buyer has created an amendment to an existing negotiation, you will be notified. Once you open the amended negotiation, you must acknowledge the amendments to prove that you have reviewed and understand the changes that have been made. When creating a new amendment, the negotiation number rev up, indicated by a comma and the amendment number (EX: RFQ 112461 becomes 112461,1).

1.   Open the amended RFQ by clicking on the **Negotiation Number**. Upon doing so, you will receive a warning message. Click **Yes** to proceed

2.   You will be brough to a screen where you must **Acknowledge** the amednmetn that has been made. Review the changes and check the checkbox to confirm, then click **Acknolwedge**

Note: The changes from the original RFQ to the newly amended RFQ will be shown side by side to view comparisons. If you have any questions about what changes have been made, please reach out to your Bechtel Buyer.

3.   After clicking **Acknowledge** you will receive a confirmation message. Click **Yes** to create a quote

4.   If you selected yes, the amended negotiation will open and you will have the ability to enter a new quote. Follow the same steps you took to create the original quote, as seen in section 3.2 and 3.3

Note: If you created a quote for the original negotiation, your quote will be pre-populated. You can submit the quote as is, or make changes before submitting.

2.5 Accessing Draft Responses

1. Access the **Sourcing Home Page** through the menu icon, located in the left corner of the page
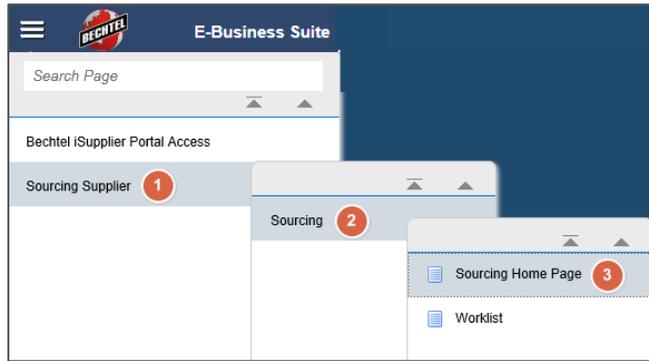
2. Under the **Quick Links** section, look for the **Manage** section, the click **Drafts**

Note: Alternatively, you can click **Full List** below "Your Active and Draft Responses" to see all responses that have not yet been awarded, rejected, or disqualified.

3. Selecting **Drafts**, will take you to the search below. It is recommended that you search for your draft response using your **Negotiation Number**.

Note: Your company's Negotiation Number, or RFQ number, can be found in an email you should have received from "Oracle R12 Development Workflow Mailer" with the subject beginning with "FYI: Open for quoting: RFQ". If you cannot find this email, ask your Bechtel buyer for the negotiation number.

3   Additional Functionality

3.1   Online Discussions

To communicate with the Buyer within a specific negotiation, you can use the **Online Discussions** tool**.** The format is similar to email, but is directly connected to the negotiation. Follow the direction below to create a new online discussion message:

1.   Open the negotiation, go to the **Actions** drop down menu and click **Online Discussions,** then **Go.**

2.   Click **New Message** to start a new message.

3.   Enter a **Subject** and **Message** and any **Attachments** (optional). Then click **Send** to send the online message to the Buyer

3.2 Quote by Spreadsheet

Quote by Spreadsheet functionality allows you to create a quote by uploading an excel document. You will begin by exporting a file then modifying it and subsequently uploading it back into the system. Quote by Spreadsheet is most commonly used when creating a quote with hundreds or thousands of line items.

1. Open the negotiation and click **Create Quote** under the **Actions** drop down menu then click **Go.**

2. Click **Quote by Spreadsheet** to begin.

3. First you must export the spreadsheet. To do this, select the desired format and click **Export.**

4. The Excel file will download onto your computer. Open the file in Excel, enter your quote and any other necessary information, then **Save** the Excel spreadsheet**.** The yellow cells are mandatory fields and the green cells are optional.
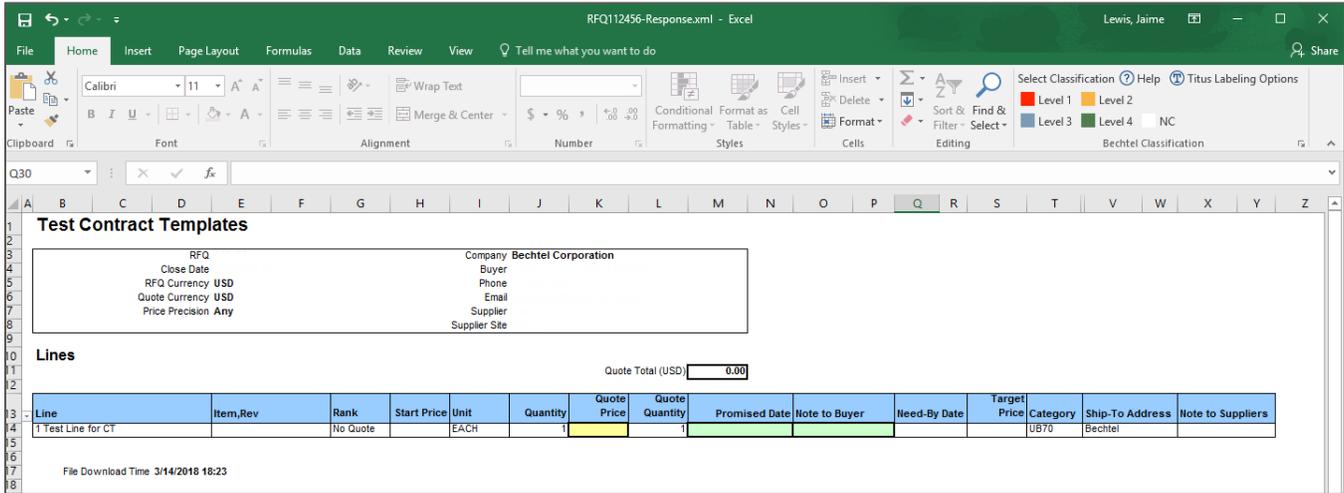
Note: When downloading the Excel spreadsheet, a zip file will be created. This zip file contains the exported spreadsheet as well as a help document. If you have any trouble using quote by spreadsheet, open the "RFQ-Quote-Help.htm" document that was downloaded onto your computer.

5. Go back to the iSupplier Portal, click **Browse** and select the saved excel file. Then click **Import.**

6. Confirm that the information was uploaded into the negotiations correctly and click **Continue.**

Create Quote: 492143 (RFQ 112456)

Cancel | View RFQ | Quote By Spreadsheet | Save Draft | **Continue**

7. Review your quote one last time to confirm that you provided all of the necessary information and it is accurate. Once ready, click **Submit** or **Save Draft.**

Create Quote 492143: Review and Submit (RFQ 112456)

Cancel | Back | Validate | Save Draft | Printable View | **Submit**

4   Support

If you have questions or need more information on a specific negotiation, please reach out to your Bechtel Buyer.

For navigation help and technical support email the Procurement Helpdesk at procweb@bechtel.com.

All login issues should be directed to the IS&T Service Center at istsc@Bechtel.com.